



Remember to Submit Certification of Trust Form

We now require a Certification of Trust form for trust-owned annuities. **After Oct. 18, 2021, we'll mark transactions as *Not In Good Order* if you submit them without this form.**

Note: You won't need to provide this form for inforce policies where we've already reviewed trust documentation.

Select [Find Forms & Materials](#) on your distributor webpage to get the Certification of Trust form.

You only need to submit this form once, and we'll keep it on file. We'll require a new form only if trustee information changes or a new trust is provided.

What does this form do?

- Provides us with the necessary information to make the legal review process more efficient.
- Allows us to accurately track trustee information and signing authorities.

What additional paperwork is needed?

- Check page 2, section 4, of the form for a list of required documents. They include:
 - The first page and the signature pages of the trust document showing the signatures of trustors and

trustees.

- If a signee is not listed on the signature page of the trust document, you must provide a court order or the page from the trust document identifying the signee as a successor trustee.
- Disbursement Form 5031 for payments and verification of the taxpayer identification number.
 - The Certification of Trust form requires the Social Security numbers of the trustees, but form 5031 is still required.

If you have any questions, contact our service specialists at 800.247.6888 or [send us a message](#).

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